Time Management for APCs

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The Hidium Group

Topics

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"How do they expect us to learn time management when every hour here feels like three hours, a week feels like a year, and the weekends fly by like ten minutes?"

What the Gurus are Saying

- Hyrum Smith
  - We think we are going to have more time at some unspecified date in the future than we do now
  - We think we can somehow save time, when in fact we have all the time there is right now
- Stephen Covey
  - The key is **not** to prioritize your schedule, but to schedule your priorities
  - What's the point of finding the fastest way "up the ladder" only to find that it is leaning against the wrong building?
- Alan Lakein
  - Stop, drop everything, get organized

Assessing Your Time Management Ability

Time Management Survey	Generally true	True more often than false	False more often than true	Generally false
A. I maintain a daily checklist of things I need to accomplish.	1	3	5	7
B. I accomplish at least 75% of what I set out to do.	1	3	5	7
C. I begin tough assignments early to give myself extra time if I need it.	1	3	5	7
D. I like to do my hardest assignments first.	1	3	5	7
E. I rarely do anything at the spur of the moment that I did not plan to do.	1	3	5	7
F. I rarely let myself be interrupted when I am doing something.	1	3	5	7
G. I control my own time and don't let others influence what I do.	1	3	5	7
H. I make sure that I have time for things I find enjoyable and are important to me.	1	3	5	7
I. Plan ahead before I begin an activity.	1	3	5	7
J. I generally do most things that I am asked to do and want to do.	1	3	5	7

Total score

How Did You Rate?

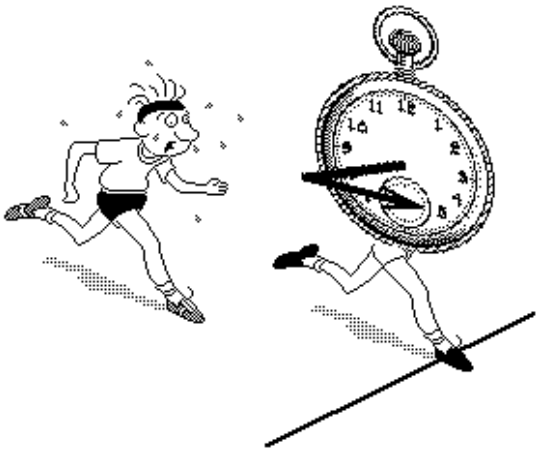
Total Score	*Grade*	*Description*	*You*
10-19	A	You have exceptionally strong time management skills.	
20-33	B	You have good time management skills, but you need to improve in some areas.	
34-46	C	You have adequate time management skills, but you need considerable improvement.	
47-60	D	You have inadequate time management skills with several needs for improvement.	
61-70	E	Your time management skills are nonexistent, with extensive areas that need improvement.	

Time Management Adages

1. Those who can't manage their time will never experience true freedom.
2. Time management requires planning, personal discipline, monitoring, and rewarding.
3. Time is a fixed asset. It will not grow. Failing to plan how you use your time is like letting someone else spend your money for you.
4. Those who lack personal discipline will always lose to those who have the discipline to manage themselves.
5. Time is an investment. Unless we measure how we use our time, we will not know what returns we are getting from our investment.
6. The greatest reward for those who manage their time well is the freedom to spend their time as they want not as someone else wants.

Common Time Wasters

- Failure to be Disciplined
  - Talking on the phone
  - Crony sessions
  - Escapist activities
  - Extracurricular activities
  - TV/radio/music



- Failure to Plan
  - Looking for work materials
  - Avoiding making a task list
  - Trying to figure out what to do
- Failure to Use Time Wisely
  - Unproductive work
  - Spending more time than is needed on a task
  - Waiting
  - Breaks
  - Unproductive meetings
  - Going to and from tasks

Principles of Time Management

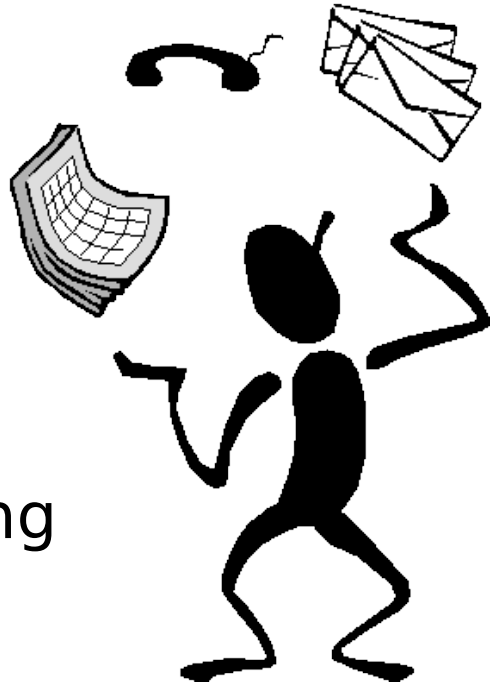
1. The Suitcase Principle
   - Scheduling your time wisely allows you to pack more into each day
2. The Time Theft Principle
   - Preventing others from robbing you of your time
3. Avoid the Urgent Principle
   - Thinking ahead to avoid the urgent
4. The Time Waste Principle
   - Avoiding time loss that cannot be recovered

Principles of Time Management (cont.)

5. The Perfection Principle
   - Learning when perfection is needed and when it is excessive.
6. Getting Started
   - Just start it!
7. Time Freedom
   - Experiencing true freedom because you understand how to manage your time.

Common Time Management Challenges

- Letting others control your time
- Losing track of the time you spend on certain activities
  - Talking on the phone
  - Computer
  - Email and internet use
- Failing to use work time wisely
- Being unorganized
- Doing specific activities at the wrong place or time
- Allowing too many interruptions
- Misusing small blocks of time
- Failing to plan ahead



Strategies for Time Management

- Reward yourself for effective time managemen
- Add a 25% buffer for unforeseen interruptions
- Balance tasks to avoid getting in a hole
- Use a monthly calendar for tracking major deadlines
- List “to-dos” daily or weekly
  - Activities listed should represent everything you plan to do that will take more than 30 minutes to accomplish
  - Judge the priority based on the consequences of not completing the task on this day
  - Be realistic about the completion status (eg. Don’t say “partially done” unless you are at least 50% done)
  - Multiply the priority by the completion status to get the score
  - Calculate the completion score using the formula
  - Comment on progress you made and problems you may have had

Sample To-Do List

Task	Description	Priority (A=high, B=medium, C=low)	Percent Complete	Notes
1	Eat Lunch with friend	A	0%	Mexican would be nice!
2	Complete transaction reconciliation	A	75%	Review questionable transaction
3	Take Purchase Card training	A	0%	Need to complete by end of week
4	File copies of documents	B	20%	Need another filing cabinet

Setting Priorities

Priority Management Survey

Point scale: A=1, B=2, C=3, D=4, E=5

1. **How often do you find yourself not having the time to do your work or putting in the right amount of time for specific projects?**
   a. All the time
   b. Often
   c. Sometimes
   d. Rarely
   e. Never
2. **How often do you put off things that you need to do because something more enjoyable comes up?**
   a. All the time
   b. Often
   c. Sometimes
   d. Rarely
   e. Never
3. **How often do you over-commit to doing things?**
   a. All the time
   b. Often
   c. Sometimes
   d. Rarely
   e. Never
4. **How often do you go without a 'to-do' list?**
   a. All the time
   b. Often
   c. Sometimes
   d. Rarely
   e. Never
5. **How often do you let distractions interrupt what you are doing?**
   a. All the time
   b. Often
   c. Sometimes
   d. Rarely
   e. Never

How Did You Rate?

Priority Management Practices Rating

Total Score	***Grade***	***Description***	***You***
5-8	A	Virtually nonexistent	
9-13	B	Minimal	
14-18	C	Good, but needs improvement	
19-25	D	Strong	

Time Management 'Health Check'

- Step back from the trees and look at the forest
- Identify process improvements
- Review your time management strategies and processes on a regular basis
  - Monthly
  - Quarterly
  - Annually

APC Specific Time Management

- Background
- Common APC Time Consumers
- General Responsibilities
- CITIDIRECT Report
- Procedures/Delinquencies
- INFOPAC File Review
- Communication
- Span of Control

Program Background

- Objectives
  - The program is intended to streamline small purchase methods, minimize paperwork, eliminate imprest fund transactions, streamline payment processes, and simplify the administrative effort associated with traditional and emergent purchase of supplies and services.
- Goal
  - The main goal of the Purchase Card Program is to provide Department of Navy users a simplified, streamlined method of purchasing and paying for simple, low-dollar value items of supply and service.

The Role of an APC

- Agency Program Coordinator (APC)
  - The APC is designated by the Commanding Officer through an official letter of delegation and is the individual responsible for day-to-day program oversight.

APC Responsibilities Overview

- Delegation letters to AO/CH
- Training requirements
- SemiAnnual review
- Span of Control
- Credit limits
- OMB reporting
- Delinquency
- Enforce policy
- Distribute information
- Interaction with APC/AO/CH
- Inactive accounts
- Fraud/misuse/abuse
- 100% transaction review
- Requests from eBusiness Operations Office

Common APC Time Consumers

- Working with Finance to get payments processed to avoid the “Delinquency List”
- Facilitating other APC/AO/CH in reviewing, reconciling and researching transactions to avoid being delinquent
- Communicating policy changes to program participants
- Fulfilling eBusiness Operations Office requests
- Reviewing and tracking questionable transactions

Common APC Time Consumers (Cont.)

- Managing rolling balances for transferring cardholders/Approving Officials and APCs with a certain time limit (i.e. 5 days)
- Fielding calls and questions for program participants
- GAO Audits and Inquiries
- Maintaining program participant profiles
- Managing credit limits within your hierarchy
- Unexpected items
  - New cardholders
  - Compromised cards

Monthly APC Responsibilities

- Knowledgeable of the GCPC process
- Knowledgeable of the Financial System
- Develop delinquency procedures
- Develop a process to reconcile invoiced amounts to what was paid
- Training of program participants

APC Time Management Strategies

- Procedures
- Reports
- Communication
- Facilitation

Procedures

- Check each cycle to determine that all statements were certified for payment
- Reconcile the corporate account summary with what was certified and what was paid
- Conduct research on any outstanding balance to determine which cycle caused the discrepancy
- Obtain access to the financial system
- Document and distribute standard operating procedures for all program participants
- Establish an organized filing system for program records

Reports

- Financial System
  - Verify that payment has been made in the financial system on a regular basis
  - Determine if corrective action is needed for the noted exceptions
  - It is important that the Command APC and Financial manager work together throughout the corrective action process
- CitiDirect Reports
  - Utilize AD-Hoc reporting for customized reports
  - Utilize the CitiDirect web reports to download into Excel for manipulation

Communication

- Develop and email distribution list to facilitate communications
  - Easier to distribute important information to program participants
- Notify all program participants of program changes as early as possible
- Update training material as changes are communicated
- Utilize the eBusiness Portal and Claimant/Activity web sites as a tool for questions and answers and encourage program participants to visit them before making a phone call
- Work up your chain of command
  - CH to AO, AO to Level 5 APC, Level 5 APC to Level 4, etc.

Facilitation

- Act as a Liaison between cardholders and AOs with the DON eBusiness Operation Office and CitiBank
- Track, follow-up and resolve issues with questionable transactions
- Seek assistance from CitiBank Client Account Specialist on bank issues
  - Attend the **Helpdesk forum** breakout to speak with a CAS rep (Barbara Goldberg)

Best Practices Discussion

- Share some Best Practices with the group
  - Spreadsheets for tracking and analyzing
  - Form templates and their submission process
  - Email templates
  - Website usage
  - CitiDirect Reports